

DONNIE CASTLEMAN EA

Tax Professional, Enrolled Agent, NTPI Fellow

Enrolled to Represent Taxpayers before the Internal Revenue Service

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SECURE ONLINE PORTAL! www.ENCYRO.com/CastlemanTax

HELPING NICE PEOPLE WITH THEIR TAX FILINGS SINCE 1994

Hello everyone!

I'm very sorry to stop mailing out letters this year, it just didn't seem like the \$800 spent and 60 hours putting it all together was beneficial, as many were being returned, many brought to my office unopened, and some having RTS written on them and sent back torn in half, whaaa?? 😞 Thanks for your continued patronage as I enter my 32nd year doing taxes! Here's this year's bullet points:

- **Family News:** Adam is practically running DHS, Amanda is the "lunch lady" at her former elementary school, Aiden is in process of finding his forever job after graduating high school, and Ashton is navigating 11th grade and working in the lunch hall. Sonja and I will celebrate 24 years in October. I'm in my fourth year playing bass at Nine Fine Irishmen in Vegas; my third year playing with Mr. Las Vegas, Wayne Newton; And my 18th year playing bass at St Thomas More Catholic Church every Sunday.
- **Fees:** Invoice MUST be settled in full at time of service for tax returns, 1099's, payroll filings etc.
- **Extensions:** No charge for filing extensions, but if you will need one send a request to CastlemanTax@Gmail.com. Make a payment by April 15 to minimize possible interest and penalties.
- **Disney, Ringling Brothers, Team Tours Employees:** Touring groups can sometimes have taxes withheld from dozens of states on their W2. I will always file New York and California state returns if you worked in those states, and will file additional states as required.
- **IRS Obligations for Self Employed:** I MUST have written expenses to file your return, and need rock solid numbers (same as last year NOT allowed) on specifically Travel, Mileage, and Business Meals. Looks like IRS is now charging an 8% penalty PLUS interest on any amount owed over \$1,000 if you didn't make quarterly estimated tax payments, I will NOT pay your penalties for you. Ever.
- **Obamacare (ACA) Health Insurance:** If you had Obamacare or are paying a reduced premium, I'll STILL need Form 1095A to file your return (there's an echo in here!) 😊 .
- **Form 8879:** Has to be signed and returned to e-file your returns.
- **My Remote Assistant:** Thankful to my lifelong friend Miss Carol in Tennessee, once again helping with bookkeeping, extensions, scheduling, and invoicing. This is her SEVENTH year with me!
- **Sending Tax Information:** NEVER by email! Use my portal at www.Encyro.com/CastlemanTax.
- **Earned Income Credit:** Q&A, ID and proof of residency for dependents. We must have a MASSIVE paper trail as IRS Due diligence audits are alive and well for taxpayers AND preparers.
- **Corporate Transparency Act for LLC Owners:** OFF THE TABLE FOR NOW! It made it to the Supreme Court. We pay and file our taxes, it's none of the government's business what we legally do for a living.
- **"Engagement" Letter:** Sign and return; it protects you as the taxpayer AND I as the preparer.
- **Refund:** Stay updated on the status of your IRS refund at www.irs.gov/refunds. And, most states have a refund status lookup on their respective websites.
- **Email:** Please update my email going forward to CastlemanTax@Gmail.com.
- **Appointments:** I'm offering limited in-person appointments, mail, drop-off, and online portal options.

Contact me at (702) 743-2277 or CastlemanTax@Gmail.com, and I look forward to assisting you with your tax filings again this year. Thanks kindly!

Sincerely,



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